

	VACANCY DETAILS
Vacancy Job Title(s):	Administrator / Trainee Paraplanner
Hours/Working Pattern:	Full Time position
Location:	Wolverhampton
Salary:	Depending on Experience
Closing Date:	14 th June 2020
How to Apply:	Send expression of interest with details of Role applying for to recruitment@wolverhampton.gov.uk and an application form will be emailed to you.
Interview Date:	30 th June 2022. However, interviews maybe earlier for the right candidate.

The Administrator should be highly organized and able to multitask with ease. Our ideal candidate should have experience as an Office Administrator, Secretary, or relevant administrative role. You should also be familiar with office software (e.g., MS Office), including word and excel as part of the role the successful applicant will be a Trainee Paraplanner and working towards the following: -

- Preparing and maintaining the client file: confirming risk profiles and client's objectives, identifying information, compiling a cashflow analysis
- Organising recommendations: identifying areas for planning, carrying out research to find solutions, considering asset allocations and investment strategies, preparing recommendation reports
- Implementing recommendations: preparing suitability letters, completing application forms, ensuring all compliance paperwork is in order, implementing plans
- Reviewing client files, portfolios, products, and processes, reviewing portfolios, initiating review meetings.
- Good telephone manner and communication skills required

Successful candidate must be willing to do the trainee Paraplanner role and carry out the training requirements for the role.